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# agricultural situation

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ECONOMICS, STATISTICS, AND COOPERATIVES SERVICE  
U.S. DEPARTMENT OF AGRICULTURE



**BETTING ON EXPORTS**

## BETTING ON EXPORTS

U.S. farmers are betting on overseas markets to convert 1979's bumper crops into record export sales.

In fact, USDA forecasters peg farm product exports near an unprecedented \$38 billion for 1979/80 (October 1979-September 1980), up almost a fifth from

1978/79. Even with a wide forecast range of \$35-\$40 billion to reflect early-season uncertainties, export value should easily top 1978/79's \$32 billion.

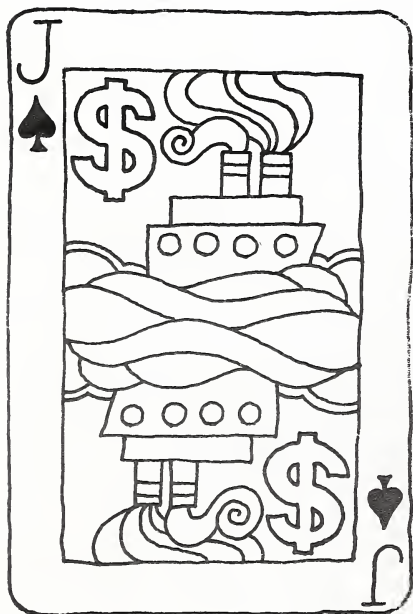
In the final analysis, much depends on the economies of the major importing countries, Southern Hemisphere grain and oilseed crops, and the performance of the U.S. transportation system, especially through the winter.

The value of farm product imports may also increase, but probably by only \$1-\$2 billion. Consequently, the U.S. agricultural trade surplus could score the biggest jump ever, perhaps topping \$20 billion.

Higher prices on world markets for grains, especially wheat, are part of the equation that is expected to result in record export sales.

However, export volume is also expected to rise sharply—about 20 million metric tons to nearly 160 million. U.S. grains will account for around four-fifths of this growth, but soybean, protein meal, and cotton shipments may also show some growth.

The short Soviet grain harvest is a major reason for the strong export prospects. Estimated at 179 million tons, the Russian grain crop is down about 58 million tons from 1978. The U.S. has agreed to sell the Soviets up to 25 million tons of grain, compared with last year's shipments of 15 million.



Grain production is also down in several other areas, including India, Eastern Europe, and Western Europe. At the same time, some of the countries which compete with the U.S. for grain sales are facing transportation problems that limit their export potential.

For oilseeds, the nearly 20-percent increase in U.S. soybean production in 1979 should help boost shipments more than a tenth, with a substantially larger volume to Eastern Europe and the USSR.

World demand for high protein feed is still expanding, and lower soybean prices this year favor meal over grain. Also, new-crop supplies from Brazil and Argentina will not be available for export until this coming spring.

Sunflowerseed exports, also following the pattern of U.S. output, are expected to double.

For 1979/80, cotton may join wheat and rice among the major commodities for which export volume exceeds domestic use. Heavy purchases by China will play a big role.

Although cotton sales to China will increase export receipts for that commodity, the overall value of U.S.

## U.S. AGRICULTURAL TRADE

Years <sup>1</sup>	Value		Export Volume
	Exports	Imports	
	<i>Billion dollars</i>		<i>Million metric tons</i>
1972/73	15.0	7.7	106.6
1973/74	21.6	10.1	99.9
1974/75	21.9	9.5	93.5
1975/76	22.8	10.5	114.1
1976/77	24.0	13.4	111.9
1977/78	27.3	13.9	131.9
1978/79	32.0	16.2	137.5
1979/80 forecast	38.0	17.5	159.0

<sup>1</sup>Years beginning October 1 of first year and ending September 30 of following year.



exports to China may only about match 1978/79's record—estimated at \$917 million.

On the other hand, expanded grain sales are forecast to boost the total value of U.S. agricultural exports to the Soviets to around \$4 billion, up some 80 percent from 1978/79.

Japan, the largest single-country U.S. market for many years, may buy about \$5.3 billion worth of U.S. farm products, only a slight increase from 1978/79. Some growth in soybean shipments and higher prices for grains will be responsible.

Sales value to Western Europe is expected to reach about \$10.3 billion,

up some 6 percent from 1978/79, largely on the strength of increased grain and soybean shipments.

U.S. farm export receipts may increase by 40 percent or more to Eastern Europe, perhaps reaching around \$2.2 billion.

U.S. export value to Asia (excluding Japan and China) in 1979/80 may reach about \$7.8 billion, up from an estimated \$5.7 billion in 1978/79.

Value is also expected to increase sharply to Africa, and a small gain is forecast for U.S. sales to Latin America. Little or no increase is anticipated in shipments to Canada and Oceania.

## U.S. EXPORT VALUE

	1976/77	1977/78	1978/79	1979/80 Forecast
<i>Billion dollars</i>				
<b>By Commodity</b>				
Grain and feed	10.1	11.7	13.6	18.5
Oilseeds and products	6.4	7.5	8.7	9.1
Cotton, incl. linters	1.5	1.7	1.9	2.0
Tobacco	1.1	1.1	1.3	1.4
Fruits, nuts, and vegetables	1.6	1.9	2.1	2.5
Sugar and tropical products	.5	.6	.7	.7
Livestock and products	2.2	2.4	3.2	3.3
Dairy products	.2	.2	.1	.1
Poultry products	.3	.3	.4	.4
<b>By Region<sup>1</sup></b>				
Western Europe	8.6	8.6	9.7	10.3
Eastern Europe	1.0	1.2	1.5	2.2
USSR	1.1	1.9	2.2	4.0
Asia (excl. Japan and China)	4.2	4.9	5.7	7.8
Japan	3.8	4.2	5.1	5.3
China	<sup>(3)</sup>	.4	.9	.9
Canada	1.6	1.6	1.7	1.7
North Africa <sup>2</sup>	.8	1.0	.8	1.3
Other Africa	.6	.7	.7	.8
Latin America	2.1	2.8	3.4	3.5
Oceania	.1	.2	.2	.2

<sup>1</sup>Adjusted for transshipments through Canada and Western Europe.

<sup>2</sup>Morocco, Algeria, Tunisia, Libya, and Egypt.

<sup>3</sup>Approximately \$1 million.



# TRADING WITH MEXICO

The discovery of major petroleum and gas reserves in Mexico has added a new wrinkle to U.S.-Mexican relations—and one that has mixed implications for U.S. farmers.

On the one hand, Mexico has tremendous potential as a market for U.S. agricultural products as the country develops through its oil and gas industries.

However, the U.S. may be faced with the dilemma: If the U.S. wants to import Mexican gas and oil, and export more U.S. products to Mexico, it may have to let in more goods that compete with some items produced domestically.

Mexico is already the fifth largest U.S. export market—taking \$6.7 billion worth of farm and nonfarm products in 1978. Although imports from Mexico are not far behind, the overall trade picture through 1978 continued to show a U.S. surplus.

As a buyer of U.S. farm products,

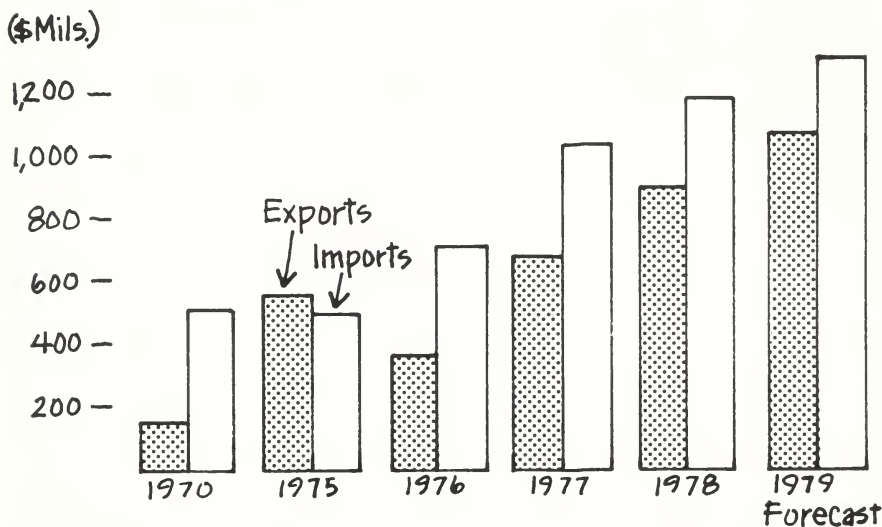
Mexico ranked first among Latin American countries and eighth in the world. U.S. agricultural sales south of the border reached \$903 million in 1978, nearly a sixfold increase since 1970.

U.S. farm product sales to Mexico probably topped \$1 billion by the end of 1979. Nevertheless, the value of U.S. agricultural imports from Mexico exceeded the export value, as has been the case in 7 of the last 9 years.

While Mexico's general import policies are restrictive, private industry and business interests rely increasingly upon imported agricultural commodities such as oilseeds, grains, hides and skins, animal fats, and processed food products. Demand for soybeans, soybean meal, and corn and sorghum is growing fast as Mexico's poultry and hog production increases.

In the future, Mexico's rising

## U.S. Agricultural Trade with Mexico



demand for agricultural products made possible by high oil revenues is expected to outstrip its ability to produce these products at home. This will give U.S. producers a chance to expand exports of both raw and processed agricultural products.

While Mexico is an important market for U.S. farm exports, the U.S. is also a most attractive market for Mexican manufacturers because of its size and location.

Mexico now has surplus quantities of ammonia fertilizers available for export—and plans to increase exports of finished fertilizer, too. While U.S. fertilizer manufacturers are not likely to welcome increased competition, this development could benefit U.S. farmers.

Time was when Mexico's big agricultural sales to the U.S. were coffee, cocoa, and bananas—which posed no problem since these products aren't grown in the U.S.

While U.S. imports of these traditional items are still sizable, the most dramatic increase in recent years has been in imports of such competitive products as animals and animal products and, in

particular, fruits and vegetables.

U.S. imports of Mexican fruits and vegetables have more than doubled since the start of the decade. Mexico's share of the \$400-million-plus U.S. winter vegetable market is now about half—and some U.S. producers feel that's more than enough.

The upshot is the current "Tomato War" which State Department and USDA negotiators are trying to settle in some very delicate negotiations.

The dispute centers around charges by Florida farmers that Mexican growers are attempting to corner the vegetable market by flooding the U.S. with produce at less-than-market value.

On October 30, 1979, the U.S. Treasury Department announced its tentative determination that five types of fresh winter vegetables—tomatoes, squash, eggplant, peppers, and cucumbers—from Mexico are not being sold at "less than fair value" within the meaning of antidumping legislation of 1921.

Other U.S. producers may face similar battles over market shares for other winter-grown commodities, since Mexico has the labor, land,





and—thanks to oil revenues—the capital to expand production of a number of competitive winter crops.

And Mexico will doubtless look north to the U.S. for markets, particularly if the U.S. is looking south to Mexico for oil and markets for its products.

At the same time, however, the Mexican Government is expected to continue to give high priority to improving income distribution and raising the standard of living of low income groups. If successful, this will boost demand for many U.S. agricultural products.

In the final analysis, some U.S. producers may lose markets to Mexico, but Mexico may well become a bigger market for U.S. farm products. One group of U.S. producers may be hurt while other producers (corn, sorghum, wheat, soybeans, and perhaps livestock) gain.

Overall, U.S. farmers would also benefit from having larger fertilizer supplies and an additional source of gas and oil.

## FOCUS ON FARM WOMEN

How are the thousands of women living on U.S. farms affected by USDA programs? What are their attitudes toward these programs? These are the questions USDA's Farm Women's Project hopes to answer with the Farm Women's Survey, now in the planning stage.

This survey of farm women will be the first of its kind and is being conducted to increase USDA's limited knowledge of the role of women on the Nation's farms.

It's part of a broad-based project on the status of farm women in the programs, decisionmaking, and jobs

under the jurisdiction of the Department of Agriculture.

Between next June and September, enumerators will contact around 4,100 women throughout the Nation. Results should be available around the end of 1980.

The information will enable USDA officials to determine if women are getting equal benefits and services from farm programs and if they have an equal chance to participate in the management of these programs.

The statistics can also be used to supplement Census data and the administrative records of agencies responsible for farm programs.

Some of the USDA programs discussed in the interviews will be those connected with ownership and operating loans, commodity payments, and financial assistance.

The purpose is not to develop a picture of the "typical farm woman." Rather, the goal is a statistical profile of the diversity of farm women, their experiences, and their attitudes.

Besides measuring the extent of farm women's participation in USDA programs, enumerators want to find out what motivates women to participate in a program, or conversely, what discourages them.

A national subsample of 625 males will also be questioned, but from an abbreviated questionnaire. This subsample will be used as a control group to determine if the feelings of women about the programs differ from those of men.

The Chicago-based National Opinion Research Center, a non-profit social research institute, will conduct the telephone interviews.

Enumerators plan to consult with a group of farm women to get their opinions on specific questions before the questionnaire is completed. Support of farm women's organizations will also be sought before the survey begins.

## GIVING GROUND

Pitted against the combined forces of man and nature, U.S. farmland has been giving ground.

Since 1950, millions of farmland acres have been lost as manmade structures competed with agriculture for land. In addition, erosion by wind and water has stripped away billions of tons of topsoil.

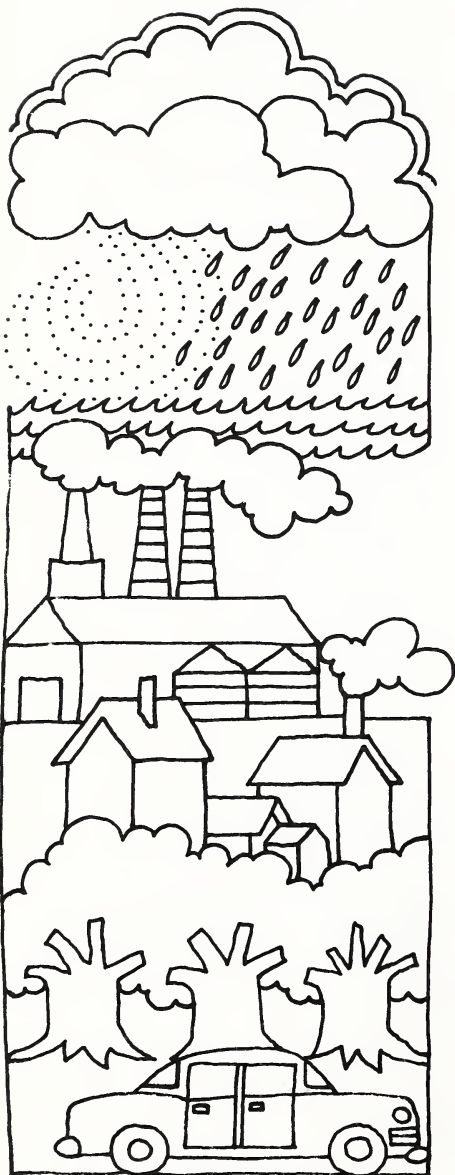
According to studies conducted by USDA's Soil Conservation Service (SCS), land used for crops declined more than a tenth in that period. Other studies, while yielding different totals, have painted a similar picture of decline.

The SCS inventories show that crop acreage accounted for about a third of all private U.S. land in 1950. These inventories, along with other studies, reveal that land used for crops declined steadily until its share of total private land stood at only a fourth by the early 1970's.

However, the latest SCS figures indicate that crop acreage may now be rebounding from this downward trend. By the 1977 inventories, acreage in crops had risen to 28 percent of all private land, though it's still too early to predict whether the long-term decline in crop acreage has really ended.

In any case, with farm exports becoming ever more important to the U.S. economy, the downward trend of the last few decades has raised concern over the ability of the U.S. to meet future demand for farm products.

Fortunately, farmland is still one of the most abundant of U.S.



resources. Moreover, not all of the reduced crop acreage has given way to highways, housing developments, shopping centers, and factories.

Some of the reduction has been beneficial to agriculture—the result of land conservation as farmers shifted more and more of their marginal and poor-quality cropland to less intensive uses, such as grassland and forest land. Because of this practice, the cropland that remains is of higher average quality than in the past.

Of course, only a portion of the reduction in crop acreage was due to conservation practices. Since 1950, industrial facilities, residential developments, highways, and commercial areas have been eating away at the Nation's rural land—only part of which is used for crops—at the rate of 1.7 million acres a year.

Between 1967 and 1975, the annual rate was over 2 million acres, half of this being of prime farmland quality. About 630,000 acres of the land converted to these irreversible uses each year was actually used for crops.

Urban land, roads, and other built-up areas occupied about 90 million acres or 6 percent of all non-Federal land in 1977, up from about 3 percent in 1950.

Along with cropland, private U.S. forest land has also been shrinking. Between 1967 and 1977, about 70 million acres of forest land were converted to other uses—mostly to pastureland and rangeland, but some to cropland and other uses. While forest land accounted for about 30 percent of all private land in 1967, it had declined to less than a fourth of the total by 1977.

The Nation's grazing land, on the other hand, has been gaining acreage in recent years. Pastureland and rangeland together accounted for less than 30 percent of all non-Federal land in 1950; by 1977, they made up over 36 percent of the total. Some of this reflects crop and forest

land converted to pasture but not enough to account for the decline in the other two categories of farmland.

Fertile soil has been lost by agriculture in recent years not only by being paved over—it has also been blown or washed away.

In 1977, nearly 2 billion tons of soil were lost to water erosion on cropland alone. The national average water erosion rate for cropland that year was 4.8 tons per acre. Although the soil loss in 1977 was down significantly from 1967, erosion is still depleting U.S. cropland faster than the soil can replenish itself.

In five States—Hawaii, Iowa, Mississippi, Missouri, and Tennessee—the 1977 rate of erosion was more than twice the national average. On cropland of marginal or poor quality, the erosion rate was as much as 15 tons per acre per year. As a general rule, the poorer the soil and the steeper the land, the more severe the erosion problem.

Water erosion is much less of a concern on land that isn't tilled. The average rate of erosion on pastureland, rangeland, and forest land in 1977 was less than 4 tons per acre. Forest land had the lowest annual soil loss—only 1.2 tons per acre.

In 1977, wind erosion on cropland in the Great Plains States averaged 5.3 tons per acre. Texas, New Mexico, and Colorado had the most severe wind erosion, with annual rates of 14.9, 11.5, and 8.9 tons per acre, respectively.

By contrast, rangeland in the Great Plains suffered no significant wind erosion. An exception was New Mexico, where winds blew about 6 tons of soil from each acre of rangeland in 1977.

Although the average rate of erosion is down and the overall quality of cropland has improved in recent years, the need for conservation is as important as ever. Estimates indicate that some

892 million acres of U.S. agricultural and forest land required conservation treatment in 1977, about the same amount as 10 years before.

One danger is that pressures to expand output and increase farm income could tempt some farmers to abandon good conservation practices and bring fragile land back into cultivation. Such a move would cause our farmland to deteriorate much faster than it is at present.

USDA hopes to avoid this and has recommended legislation to encourage sound land use and farming practices.

Fortunately, the United States still has a reserve of land that could

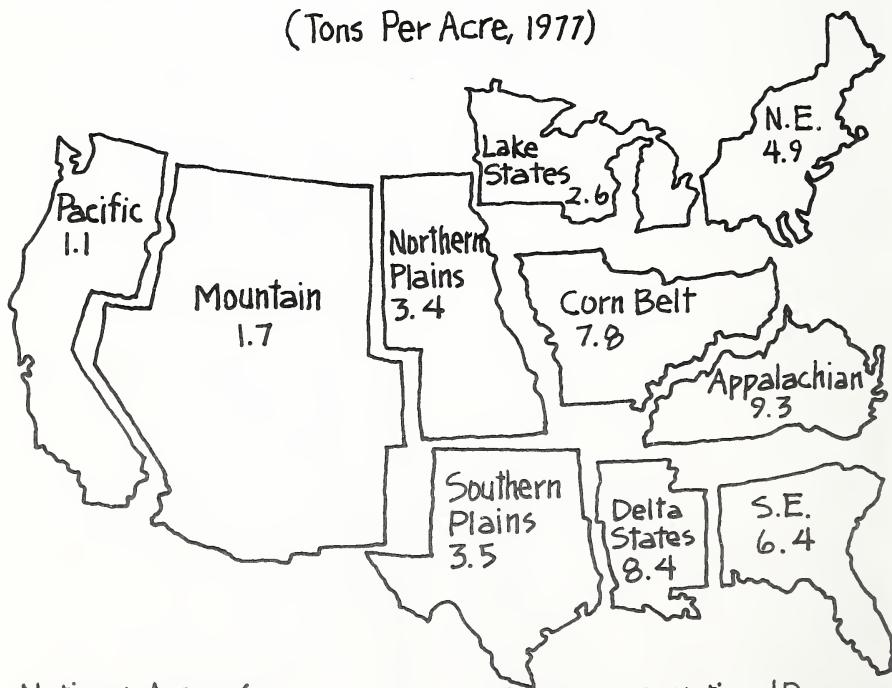
be converted to cropland. An estimated 135 million acres of rangeland, pastureland, forest land, and other rural land had high or medium potential for conversion to use as cropland in 1977.

Of this total, 40 million acres had high potential for crops and could be converted through tillage and the use of basic soil conservation practices. Over one-half of this land was prime farmland that would require no special treatment.

About 95 million acres of rural land had medium potential for cropland use in 1977. This land would require a significantly higher investment for conversion to cropland, although such a shift was considered feasible.

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## Annual Soil Loss To Water Erosion on Cropland (Tons Per Acre, 1977)



National Average  
4.8 tons per acre

Source: SCS National Resource Inventories

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## HERE'S WALLY

Two recent appearances on "The Tonight Show" and one on "Hee Haw" aren't about to launch a new career for Kansas farmer Wallace E. ("Wally") Lattimer.

He hasn't lost his taste for adventure, but he's been farming all his life and—at age 98—that represents a pretty firm commitment to the land.

Born in Morris, Ill., in 1881, Lattimer came to Kansas with his parents in 1886. Since 1903, he's been busy raising hogs and dairy cows, producing wheat, alfalfa, and milo, and running a commercial gardening operation on his 160-acre farm in Lyons, Kans., located about 100 miles east of Dodge City.

Time was when he had about 200 hogs and a dozen or more dairy cows, but he now devotes most of his considerable energy to his commercial gardening—tomatoes, beans, peas, potatoes, and peonies.

With a workload and a wit that belie his age, Lattimer was already used to interruptions from inquiring journalists when a newspaper story about him caught the attention of a

Johnny Carson booking agent.

The agent soon discovered Lattimer's special knack for relating anecdotes, coupled with a gift of recollection ("I bought a Model T Ford on the 14th day of April 1915").

Lattimer's appearance on "The Tonight Show" early last fall was so well received by both Carson and television viewers that 6 weeks later Lattimer made a return visit—after filming an episode of "Hee Haw."

Several months before he made his debut on network television, Lattimer was in Washington, D.C., to meet Secretary of Agriculture Bob Bergland. He took that opportunity to talk about farming over the last several decades.

The times of the Depression and the Dust Bowl were the hardest, Lattimer said. "A lot of farmers lost their land and many had to borrow money to keep from going under."

He said he was able to see it through because, after paying off his farm in 1918, he never went into debt again. "I don't believe in that credit business," Lattimer said.

Although he was able to survive



the hard times, Lattimer doesn't doubt that farming is a very risky business.

"The farmer is the biggest gambler there is," Lattimer said. "He gambles on the weather, he gambles on crops, floods, drought, and everything else."

Lattimer's gamble paid off. Over the years, he's seen the land he originally paid \$100 an acre for—and the wild prairie around it—develop into expensive, irrigated farmland.

Though he can be justifiably proud of his success in farming, Lattimer is more likely to boast of being one of the Nation's most faithful crop reporters. He claims some 70 years of responding to crop and livestock surveys, always to the best of his knowledge, he said.

While his age and the number of years he's been farming set him apart from the mainstream of crop

reporters, he shares with them a common concern for the welfare of his farm community and of the agricultural sector as a whole.

Typical of volunteer crop reporters across the country, Lattimer is not a man to pass the buck. He helped organize his local farm bureau around 1920 and played an active role in farmer cooperatives, serving as secretary of the board of directors of one cooperative and on the board of directors of another.

Between his farming and other activities, he also found the time to see a good part of the world, including Australia, Tahiti, Alaska, and the Panama Canal.

Twice a widower, Lattimer's two marriages produced 5 sons, 4 daughters, and a parcel of grandchildren. The sons and daughters all chose careers other than farming, he said, but one son still helps out with the farm.

## COMPARISON SHOPPING

The sharp upswing in food prices beginning in the early 1970's may have put the pinch on many consumer budgets, but the latest figures still show Americans working fewer hours for the money to buy food than people in most other countries.

The average Washington, D.C., wage earner worked 1 hour and 27 minutes in 1978 for the money to pack his shopping basket with a dozen oranges, a dozen large eggs, and a pound each of white bread, butter, tomatoes, sliced bacon, sirloin steak, pork chops, and chicken.

After the same amount of time on the job, the average Japanese worker with a taste for citrus could have splurged for a dozen oranges. However, he or she would have had to go back to work for another 5¾



hours to earn enough to buy all the products the U.S. worker could purchase for 1½ hours' labor.

West Germans paid less than Americans for oranges and bread, but it took them 2 hours of work to buy all the listed foods. It took the Italians, the French, and the Danish more than 2 hours, and the British more than 3 hours.

Of 11 industrial nations, only Canada came close to the U.S. figure. In fact, Canadian workers edged out their U.S. counterparts by 3½ minutes.

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# Briefings

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RECENT REPORTS BY USDA OF ECONOMIC, MARKETING, AND RESEARCH DEVELOPMENTS AFFECTING FARMERS

**SOUTHERN HEMISPHERE WATCH.** . . Forecasters will be watching the size and quality of Southern Hemisphere grain and oilseed harvests this winter and spring for the impact on U.S. crop prices. Although grain crops south of the equator account for only about 7 percent of world production, they comprise almost 20 percent of the volume of wheat and coarse grains moving in world trade. Southern Hemisphere soybeans account for 20 percent of world soybean output but 30 percent of world trade in that commodity.

**WESTERN WHITE.** . . China purchased a small amount of U.S. western white wheat on a trial basis, according to the U.S. agricultural attache in Hong Kong. This will be the first shipment of wheat from the Pacific Northwest since the Chinese stopped imports in 1974 because of the TCK smut problem. The current lower prices of U.S. western white wheat, due to reduced demand in Iran and Pakistan, may provide an incentive to China for further trials. The freight advantage of exports to China from the Pacific Northwest, rather than the Gulf area, is about \$8 a ton.

**EXTENDING THE PROTECTION.** . . USDA's all-risk Federal crop insurance program will be available in 150 additional counties in 28 States in time for the 1980 spring plantings. This brings to 1,676 the number of counties served by USDA's Federal Crop Insurance Corporation (FCIC). The FCIC program provides producers with the opportunity to insure their major crops, thus guaranteeing themselves an established income should those crops be damaged or lost due to natural hazards. Legislation pending in Congress would permit the crop insurance program to expand at a faster rate.

**NEW TRADE OFFICE OPENS DOORS.** . . The first U.S. agricultural trade office in Western Europe opened its doors in Hamburg, West Germany, in mid-November. It is one of a network of agricultural trade offices authorized by Congress last year to help promote export sales and to serve as a home base for U.S. exporters. Hamburg is the second largest port in Europe and a key city for an export promotion center. The office will serve as the focal point for export sales promotion in West Germany, one of the five largest markets for U.S. farm products.

**CHANGING THE RECORD BOOKS.** . .For the first time ever, U.S. grain exports topped 100 million bushels for 5 weeks in a row, according to USDA's Federal Grain Inspection Service. This occurred from the week ending Oct. 18 to the week ending Nov. 15. During the same period, a new single-week record was also set—119,051,000 bushels.

**FERTILIZER TALLY.** . .Fertilizer consumption totaled 49.0 million tons in the U.S. and Puerto Rico during the year ending June 30, 1979, according to USDA's Crop Reporting Board. This was an increase of 7 percent from the 45.6 million tons consumed during the 1978 fertilizer year. The total tonnage consisted of 52 percent dry bulk fertilizer, 33 percent fluid, and 15 percent dry bagged fertilizer.

**DIRECT TO THE CONSUMER.** . .Of six States surveyed on 1978 farmer-to-consumer direct marketing activities, Michigan was the leader with nearly \$76 million in direct market sales. Pennsylvania was second, followed by Ohio, Indiana, New Jersey, and North Carolina. Michigan also had the largest number of growers involved in direct marketing—over 23,000 in 1978. However, in terms of average sales per grower, Pennsylvania led with \$10,000 per direct marketer. Floral and nursery products were the major items in 1978 direct marketings.

**PEANUT POWER.** . .U.S. peanut exports have been record high the last two seasons, totaling more than 1.1 billion pounds in 1978/79. U.S. peanuts have been competitively priced in world markets since supplies from India and other major exporting countries were reduced. The 1979/80 outlook is for another good export year, with the level influenced largely by India's peanut situation, since more U.S. peanuts will be available for export or domestic crush.



## AGRICULTURAL SITUATION

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## NEW PLANS FOR A NEW YEAR

### Agricultural Situation Ends An Era

This is the final issue of the *Agricultural Situation*. It is being retired after a long and useful career serving agriculture.

*Agricultural Situation* was first published in 1921 and has been an important link between USDA's Crop Reporting Board and the farmers, ranchers, and others who have voluntarily participated in agricultural surveys over the years.

The *Agricultural Situation*, and its companion publication from USDA, *Farm Index*, are giving way to a single new, more informative

magazine—*Farmline*.

*Farmline* will offer the news, analysis, and outlook important to decisionmaking in today's agriculture. Wide-ranging articles will cover Crop Reporting Board actions and surveys; farm and rural life research; and key developments related to production, demand, trade, prices, and other farm issues.

*Farmline* will be published beginning in early 1980. Many regular readers of the *Agricultural Situation* will automatically receive *Farmline* in its place.



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